<u>PC-ACE Pro32 – Completing the Reference Files</u>

After installing PC-ACE Pro32, you need to complete the Reference File Maintenance prior to creating claims. Click on the Reference File Maintenance option located on the PC-ACE Pro32 main toolbar (It looks like an open folder). You will be asked to enter a User ID and Password. The default User ID and Password is SYSADMIN. The PC-ACE Pro32 software will automatically change every letter to uppercase. The five reference tabs are: Patient, Payer, Provider (Inst), Provider (Prof), and Codes/Misc.

For school districts (LEAs) the only three options you will need to complete are the Patient (student), Provider (Prof), and Codes/Misc (Figure 1 showing Patient tab). The following guide sheet will walk you through setting up all of these fields. There is no need to change anything on the other two tabs.

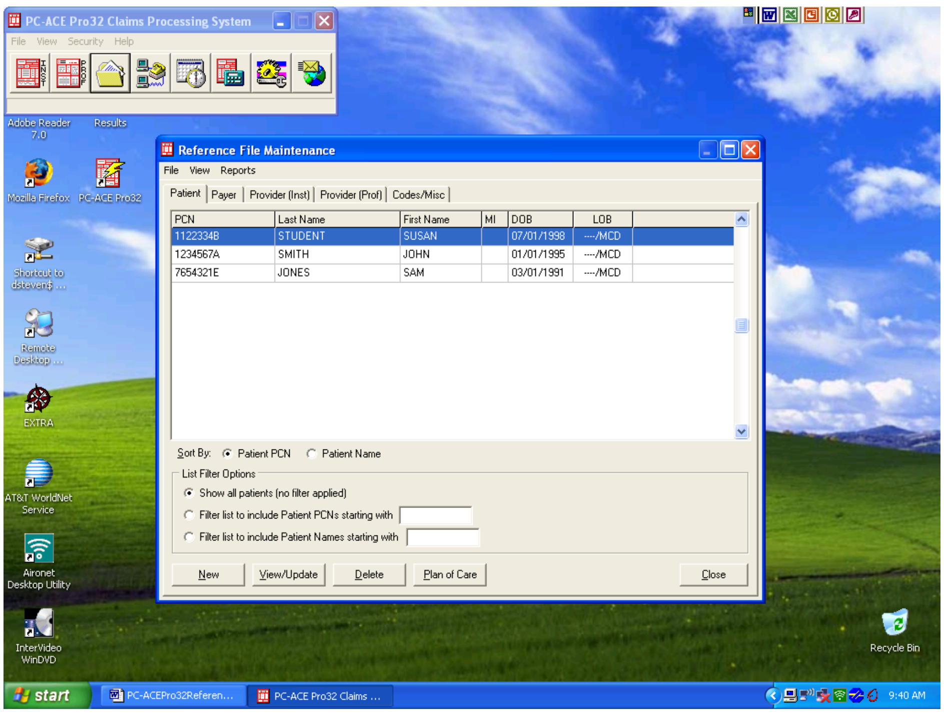

Figure 1: Reference File Maintenance screen.

Setup Steps for Provider (Prof):

1. Click on the Provider (Prof) tab to enter information about your district.
2. To add a Provider (Prof), click on New in the bottom left corner of Provider tab.
3. A box will pop-up called New Provider Options (Figure 2). Select the option of: Create a completely new provider (all fields blank). Click OK.

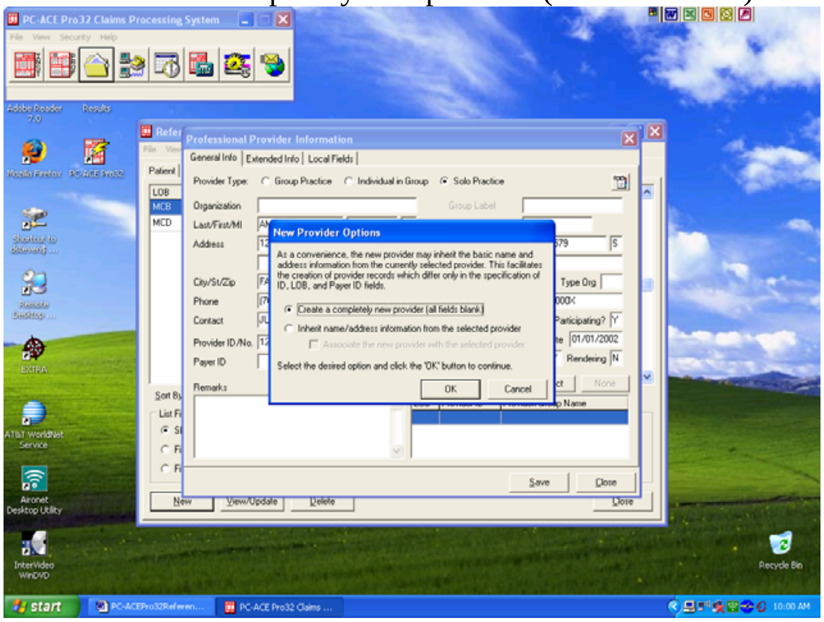

Figure 2: New Provider screen.

4. The Provider Information screen should now be open (Figure 3). In the General Info tab please select the provider type of Solo Practice.

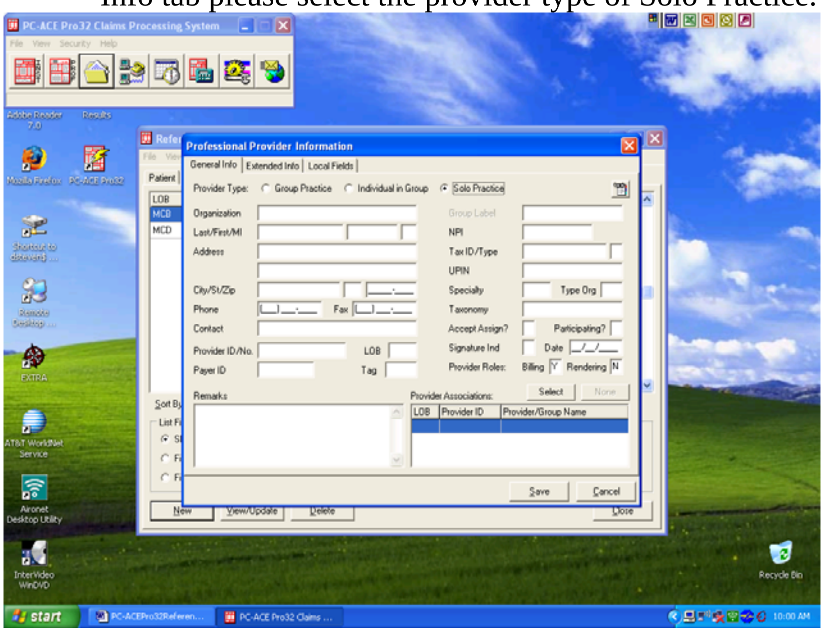

Figure 3: Provider General Information screen.

5. Complete the Organization field by entering the name of the district and leave the Last/First/MI fields blank.
6. Complete the Address, City, State, Zip, Phone and FAX fields for the district.
7. Enter a contact name for the district.
8. Enter your Iowa Medicaid provider number in the Provider ID/No. field
9. Complete the LOB box by putting MCD (Medicaid) in the field or right click and choose MCD – Medicaid.
10. Complete the Payer ID box by right clicking and scrolling down to find the Medicaid for Iowa option. Highlight this option and click on Select.
11. The Tag field is not required.
12. Enter your Tax ID number and E for EIN.
13. The UPIN, Specialty, Type Org, and Taxonomy Code are not required.
14. Enter the appropriate code in Accept Assign field.
15. The Participating field is not required.
16. Signature Ind is required. Right-click and choose Yes. You must put the date of your provider enrollment in the date field.
17. There is no need to change the Provider Roles.
18. Go to the Local Fields tab (Figure 4) and enter your Submitter ID that was sent to you by EDISS as the Trading Partner ID.

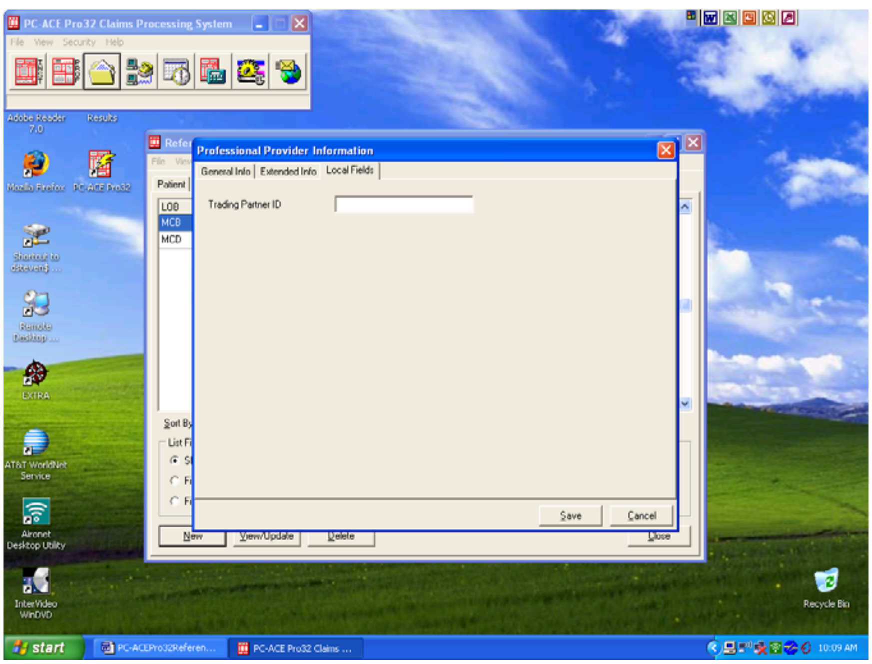

Figure 4: New Provider Local Fields screen.

19. Click Save and your provider information will be stored in the cross reference files of the software.
20. You must complete this screen for each Provider number that you intend on using. Once entered, you will only need to go to this screen to make changes in your information.

<u>Setup Steps for Patient (Students for LEAs):</u>

1. Select the Patient Tab in the upper left corner of the Reference File Maintenance screen.
2. Click on New in the bottom left corner to open the Patient Information screen (Figure 5).

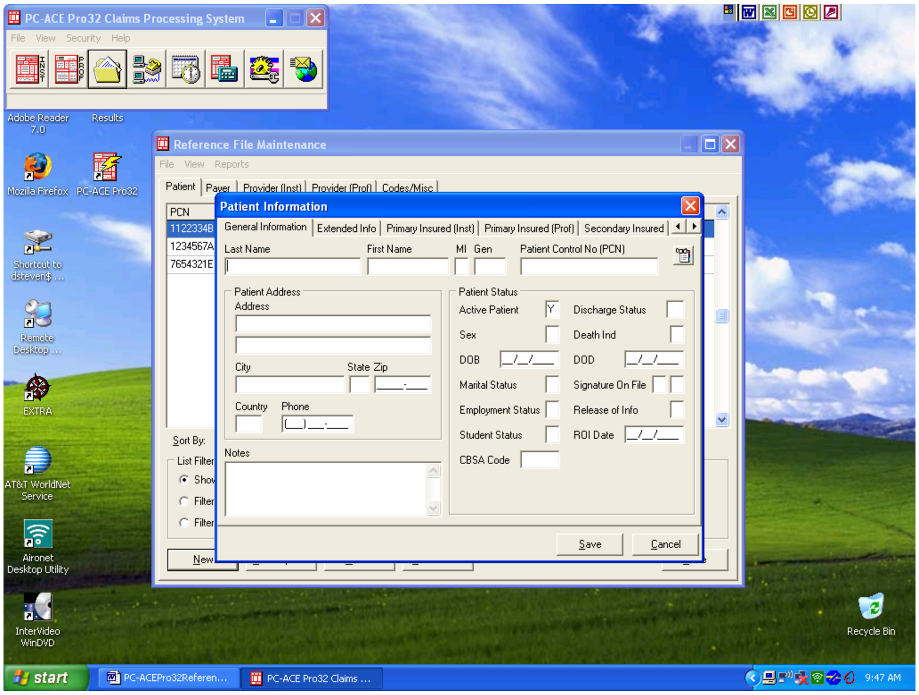

Figure 5: New Patient screen.

3. Enter the student’s Last Name and First Name.
4. Enter a Patient Control Number (PCN). This would be the Iowa Medicaid ID number for the student. This field is required.
5. Enter the student’s address, city, state and zip – This is required.
6. Active patient is already checked.
7. Enter the student’s sex and date of birth - ddmmyyyy– This is required.
8. Go to Signature on File and press F2 or right-click to choose from the options in the right box. The left box is for the Institutional providers and does not apply to LEAs. This information should relate to the Medicaid Parental Consent form.
9. Go to Release of Information and press F2 or right-click to choose the most appropriate option. Also, the ROI (release of information) date would be the date the parents signed the consent.

10. Go to the second tab named Extended Info (Figure 6). You can assign your provider number to the patient right here. For LEAs, go to the Professional section at the bottom of the screen and go to Billing/Rendering Provider ID. Enter your Iowa Medicaid provider number in the Billing Provider ID field. By completing this field, your provider number will automatically populate when you are creating claims.

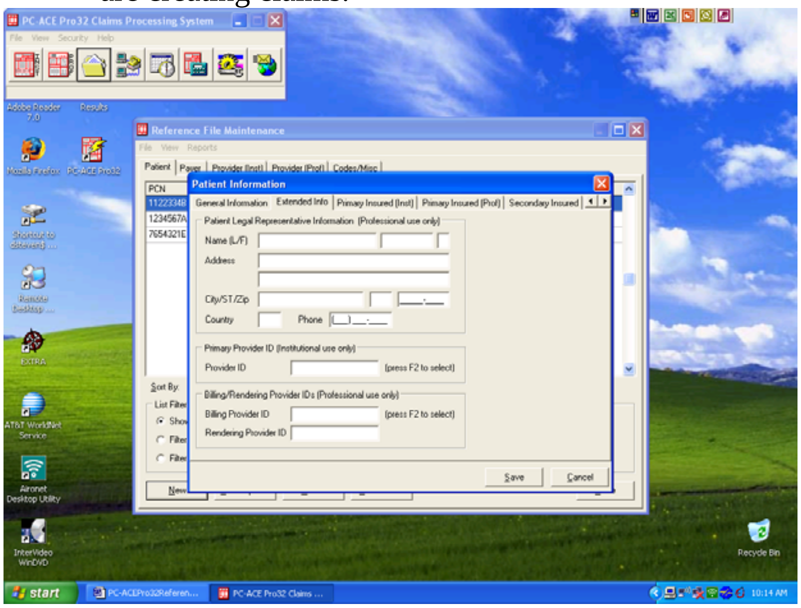

Figure 6: New Patient Extended Info screen.

11. Go to the fourth tab name Primary Insured (Prof) to enter the Medicaid information (Figure 7). Press F2 or right-click in the Payer ID field and choose Medicaid for Iowa.

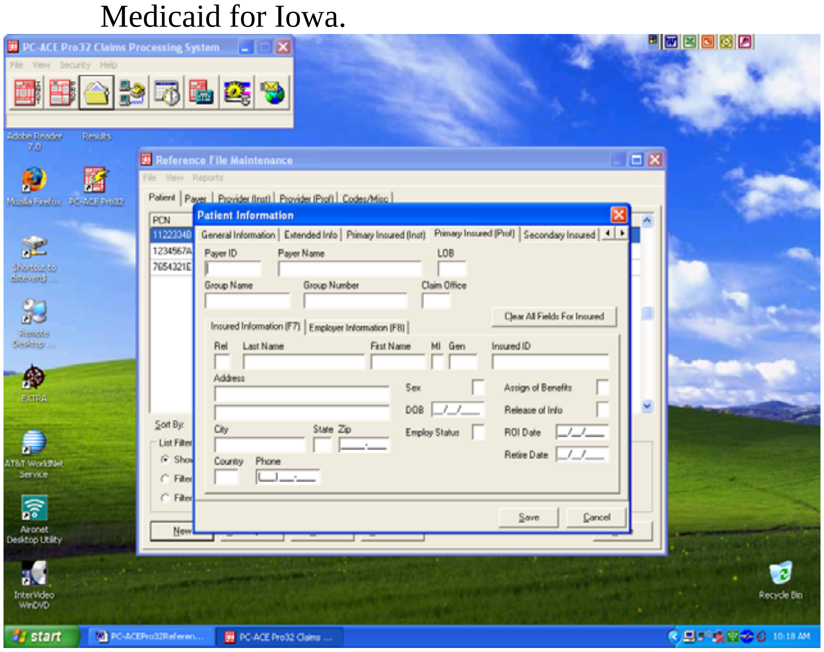

Figure 7: New Patient Primary Insured (Prof) screen.

12. Go down to Insured Information and enter 18 in the Rel field to identify the student as the insured with Medicaid. This will automatically populate the rest of the information on this page from the demographic information entered in the first tab of this option.
13. Go to Insured ID and enter your student's Iowa Medicaid ID number there. (ex. 1234567A)
14. Go to Assign of Benefits and press F2 or right-click to select Y for Yes.
15. Click Save to create the student cross reference data..
16. You must complete this screen for each student that you intend on claiming reimbursement. Once entered, you will only need to go to this screen to make changes in their information.

Setup steps for Codes/Misc:

1. Click on the Codes/Misc tab to see the various options (Figure 8). The only two options that districts will need to access are the Submitter under the Shared column and the Charges Master under the Professional column.

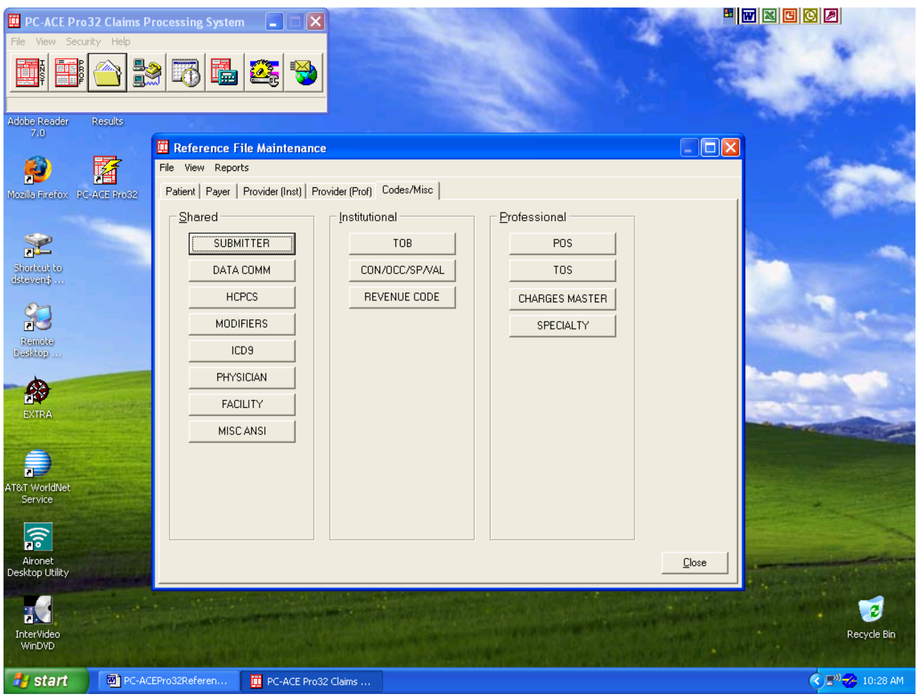

Figure 8: Codes/Misc main screen.

2. Click on the Submitter button to bring up the Submitter Setup screen (Figure 9).

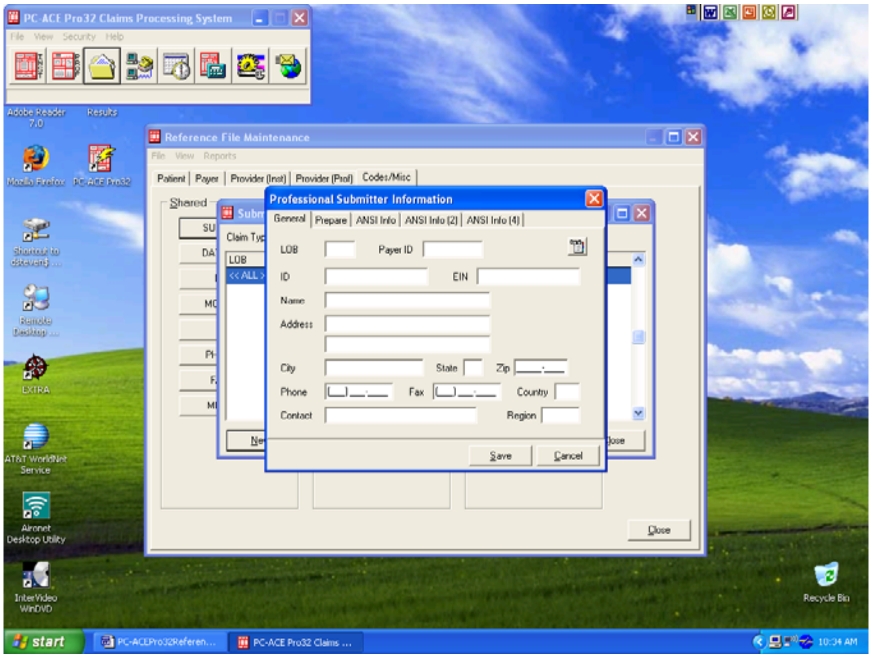

Figure 9: Submitter Setup screen.

3. There is a pre-loaded submitter already listed there.
4. Click the button next to Professional as LEAs are this provider type.
5. Click on View/Update at the bottom of the screen.
6. Click in the ID section. Type in your Vendor Trading Partner ID that was sent to you from EDISS.
7. Enter your EIN or Tax ID number.
8. Enter your name, address, city, state, and zip.
9. Enter your phone and FAX number.
10. Enter a name of a contact person.
11. Country and Region are not required.
12. Do not change any information on the other tabs in the Submitter information box.
13. Click Save and this information will be added to the cross reference data. then click Close in Submitter Setup box to return to the Codes/Misc screen.
14. Click on the Charges Master button to bring up the Charges Master Setup screen (Figure 10 on the next page). This is where you would enter all of the procedure codes you plan on using in your claims, along with your district’s cost for the services.

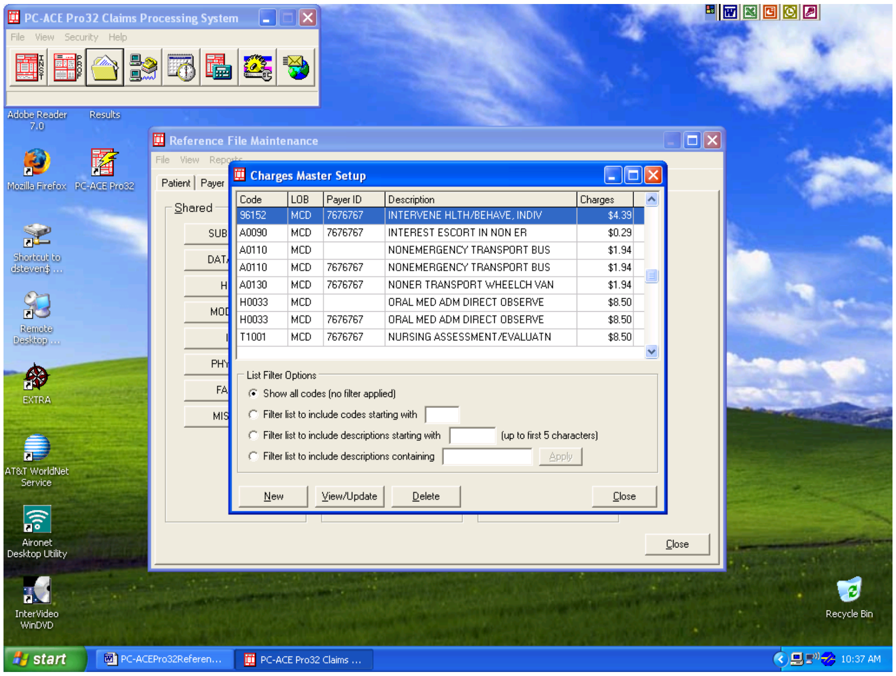

Figure 10: Charges Master Setup screen.

15. Click on the New button to bring up the Charges Master Information screen (Figure 11).

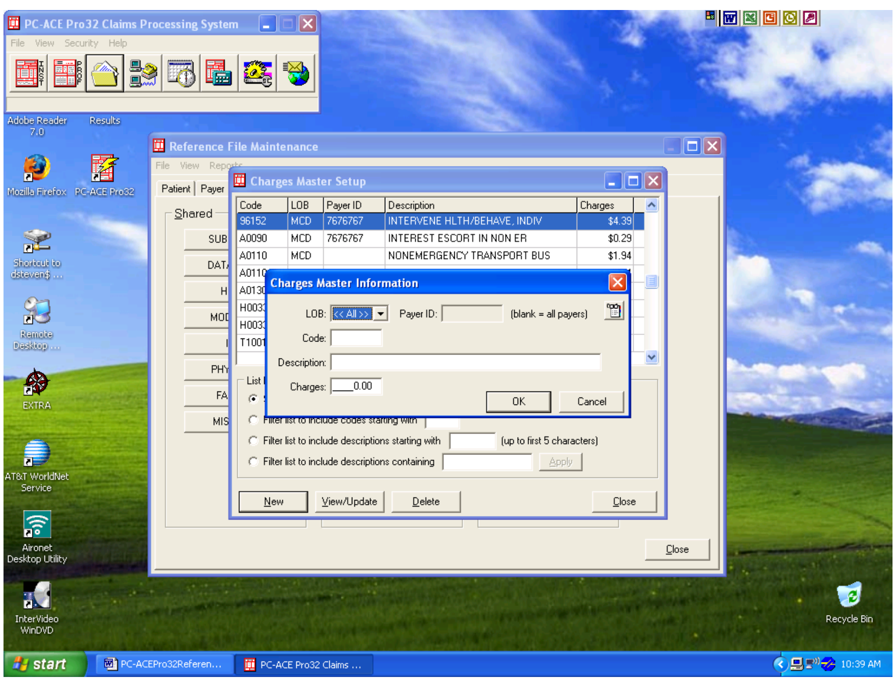

Figure 11: Charges Master Information screen.

16. For the LOB field, use the drop-down option and select MCD for Medicaid.
17. Press F2 or right click to select Iowa Medicaid as the Payer option.

18. In the Code field, enter the procedure code (T1019 for health paraprofessional as an example). Do NOT enter the modifier number in this field, but simply the five digit procedure code.
19. The description field should automatically fill-in with the standard text for the universal code.
20. Enter your district's cost rate for this procedure code.
21. Click OK to save this information in the cross reference data.
22. Repeat Steps 15-21 for each procedure code the district plans on claiming reimbursement.
23. When finished, click on Close to exit the Charges Master screen.

This will complete the setup of the reference files, so click on Close to exit the Reference File Maintenance screen and return to the menu of options at the top left of the screen.